

### **Updating and Deleting Expense Transactions**

Cardinal allows users to update or delete expense transactions (Travel Authorizations, Cash Advances, and Expense Reports) after they have been saved. This Job Aid identifies the requirements for updating or deleting expense transactions and provides step by step instructions on how to do so.

Once expense transactions are deleted, they cannot be viewed. The delete action is permanent and cannot be undone.

**Navigation Note:** Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.

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### **Revision History**

Revision Date	Summary of Changes
3/1/2025	Updated the screenshots of the Search pages ( <u>Section 1</u> , after Step 1; <u>Section 2</u> , after Step 1; <u>Section 3</u> , after Step 1; <u>Section 4</u> , after Step 1; <u>Section 5</u> , after Step 1; <u>Section 6</u> , after Step 1; <u>Section 7</u> , after Step 1). Added reference information to the Overview of the Cardinal FIN Search Pages Job Aid.



### Updating a Travel Authorization

A Travel Authorization can be updated if it has been:

- Saved, but not submitted for approvals
- Withdrawn from approvals after submission
- Sent back by the approver with a required comment
- An email is sent to the employee or the proxy who keyed the Travel Authorization

A Travel Authorization cannot be updated if it has been:

- Approved
- Denied by the approver
- An email is sent to the employee or proxy who keyed the Travel Authorization
- A denied Travel Authorization must be deleted

Step	Action							
1.	Navigate to the <b>Travel Authorization</b> page using the following path: <b>Main Menu &gt; Employee Self-Service &gt; Travel and Expenses &gt; Travel Authorizations &gt;</b> <b>Create/Modify</b>							
The Trave	el Authorization Add a New Value page displays.							
Favorites -	Main Menu							
Travel Author	ization							
Add a New	Value Q Find an Existing Value							
*Empl IDAdd	*Empl ID Q Add							
i	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled "Overview of the Cardinal FIN Search Pages". This Job Aid is located on the Cardinal Website in <b>Job Aids</b> under <b>Learning</b> .							
2.	Click the Find an Existing Value button.							
	Q Find an Existing Value							



Step	Action								
The Travel Authorization search page displays.									
Favorites  Main Menu  Favorites  Favorites									
Trave	Authorization								
Fi	nd an Existing Value Search Criteria nter any information you have and click Search. Leave fields blank for a list of all values.								
	Recent Searches     Choose from recent searches     Image: Choose from saved searches       Image: Choose from recent searches     Image: Choose from saved searches								
	Authorization ID begins with   Description begins with   Name begins with   EmpI ID begins with   Status =   Creation Date =   Show fewer options  Case Sensitive  Search Clear								
3.	Enter the <b>Authorization ID</b> on the <b>Find an Existing Value</b> page for the Travel Authorization that you want to modify.								
	Search by: Authorization ID V begins with								
İ	If the <b>Authorization ID</b> is not known, search using the other options by clicking the <b>Search</b> <b>by</b> dropdown menu. The other search options include "Authorization ID", "Description Name", "Empl ID", "Status", and "Creation Date".								
4.	Click the <b>Search</b> button.								
	Search								
ĺ	Users can only search for and update Travel Authorizations of employees for whom they are a proxy with "Edit & Submit" authorization. For more detailed information about authorizing a proxy, see the Job Aid titled <b>AP315: Authorizing a Proxy for an Employee</b> located on the Cardinal website in <b>Job Aids</b> under <b>Learning</b> .								



Step	Action						
The Modify Travel Authorization page displays.							
	New Window   Help   Personalize Page Modify Travel Authorization						
	Construction     Construction     Construction     Construction       * "Date     * Expense Type     * Cascryption     * Ray for quartery meeting     * Cascryption       * "Billing Type     * Stay for quartery meeting     * Cascryption     * Stay for quartery meeting     * Stay for quartery meeting       * "Billing Type     * Stay for quartery meeting       * "Billing Type     * Stay for quartery meeting       * "Number of Hysis 1     133:00     * Stay for quartery meeting     * Stay for quartery meeting       * Accounting Details @     * Accounting Details @       * 1021/2024 (6)     Logging Fees and Taxes     * Indel fees and taxes						
1	This page is identical to the page that was used to create the Travel Authorization. Make the updates to the Travel Authorization. Users can perform any action on the Travel Authorization that they could to create it (e.g., add or delete lines, change amounts, dates, locations, etc.). If modifying a Travel Authorization that has been sent back by an approver, the user will see <b>Sent Back for Revision</b> in red font at the top of the page and a hyperlink with the approver's comment.						
5.	Click the <b>Summary and Submit</b> link at the top of the page after completing all revisions.						
6.	Click the <b>Save for Later</b> link if the transaction is not ready to submit for approval.						
7.	Click the Certification checkbox option when the transaction is ready to be submitted.  By checking this box, the employee has certified the expenses listed are estimates of expenses to be incurred by the employee on official business of the Commonwealth of Virginia and include only such expenses necessary in the conduct of that business.  Submit Travel Authorization						
8.	Click the <b>Submit Travel Authorization</b> button to send the updated Travel Authorization through approval workflow.           Submit Travel Authorization						



Step	Action							
The Travel Auth Submit Confirm page displays in a pop-up window.								
	Travel Auth Submit Confirm	×						
	Travel Authorization	пар						
	Submit Confirmation							
	Totals ②							
	Total Authorized Amount 261.33 USD							
	OK Cancel							
9.	Click the <b>OK</b> button to confirm the submission.							
	OK Cancel							
i	Once submitted, the Travel Authorization can only be modified by clicking to <b>Travel Authorization</b> button when the travel authorization is in in submitter status or if it is sent back by the approver.	he <b>Withdraw</b> d for approval						



### **Canceling a Travel Authorization**

An approved travel authorization can be cancelled if no longer needed. Once cancelled, it cannot be assigned to an Expense Report.

Users can only cancel a Travel Authorization if it has been approved but not assigned to an Expense Report.

Step	Action
1.	Navigate to the Cancel Travel Authorization page using the following path:
	Main Menu > Employee Self-Service > Travel and Expenses > Travel Authorizations > Cancel

The Cancel Travel Authorization Search page displays.

Favorites -	Main Menu
Cancel Trav Find an Search Enter any	rel Authorization Existing Value Criteria information you have and click Search. Leave fields blank for a list of all values.
ت ا	ecent Searches Choose from recent searches V 🖉 🖓 Saved Searches Choose from saved searches V
	Empl ID begins with   Name begins with
	Case Sensitive Search Clear
i FV	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled Overview of the Cardinal FIN Search Pages". This Job Aid is located on the Cardinal Vebsite in <b>Job Aids</b> under <b>Learning</b> .
2. T	he employee ID will default into the <b>Empl ID</b> field. Enter their Employee ID or Name if ancelling a Travel Authorization for another employee.
N ti	<b>lote</b> : Users can only search for and cancel Travel Authorizations of employees for whom ney are a proxy.
	Empl ID begins with  Name begins with
3. C	Click the <b>Search</b> button.
	Search



Step	Action									
The Cancel Approved Travel Authorization page displays.										
	Favorites  Main Menu  Employee Self-Service  Travel and Expenses  Cancel									
	Travel and Expense									
	Cancel A	pproved Travel Aut	horization							
	Travel Auth	orization Information								
	Select	Description	Authorization ID	Date From	Date To	Amount	Currency			
		Dept Head Qtrly Meeting	000005688	10/22/2024	10/23/2024	160.00	USD			
		Cancel Selected Travel Author	ization(s)	]						
i	Only Tra	avel Authorizations	that are eligil	ole for ca	ncellation	n display.				
4.	Click the	e <b>Select</b> checkbox	option beside	e the Trav	el Autho	rization th	nat requires can	cellation.		
	Select									
5.	Click the	e Cancel Selected	I Travel Auth	orization	(s) butto	n.				
	Cancel Selected Travel Authorization(s)									
i	The car	ncel action is saved	on the Trave	l Authoriz	ation.					



### **Deleting a Travel Authorization**

Users can only delete a Travel Authorization if it has been:

- Saved, but not Submitted for approvals
- Withdrawn from approval after submission
- Cancelled approved Travel Authorizations that are not associated with an Expense Report can be cancelled by users with appropriate access
- Sent Back by the approver with a required comment. An email is sent to the employee or proxy who keyed the Travel Authorization.
- Denied by the approver. An email is sent to the employee or proxy who keyed the Travel Authorization.

Step	Action
1.	Navigate to the Delete Travel Authorization page using the following path:
	Main Menu > Employee Self-Service > Travel and Expenses > Travel Authorizations > Delete

The Delete Travel Authorization Search page displays.

Favorites Delete Tr	Main Menu      → Employee Self-Service      → Travel and Expenses      → Travel Authorizations      → Delete  ravel Authorization
Enter	Chick Search       Leave fields blank for a list of all values.         Recent Searches       Choose from recent searches       Image: Choose from saved searches
	Empl ID begins with V Name begins with V A Show fewer options Case Sensitive Search Clear
F "( in	or more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled Overview of the Cardinal FIN Search Pages". This Job Aid is located on the Cardinal Website Job Aids under Learning.
2. T de	he Employee ID will default into the <b>Empl ID</b> field. Enter their Employee ID or Name if eleting a Travel Authorization for another employee.



Step	Action								
i	Users can only search for and delete Travel Authorizations of employees for whom they are a proxy with "Edit & Submit" authorization. For more detailed information about authorizing a proxy, see the job aid titled <b>AP315: Authorizing a Proxy for an Employee</b> located on the Cardinal website in <b>Job Aids</b> under <b>Learning</b> .								
3.	Click th	ne <b>Se</b> a Irch	arch button.						
The <b>De</b>	elete Tra	vel A	uthorization pag	e displays.					
	Tra	avel and	Expense						
	De	elete a	Travel Authorization						
	Tr	avel Aut	horizations						
		Select	Description	Authorization ID	Date From	Date To	Amount	Currency	
			Dept Head Qtrly Meeting	000005687	10/21/2024	10/22/2024	261.33	USD	
			Delete Selected Authorization(s)	)		1		1	]
i	Only Tr	ravel	Authorizations tha	t are eligible	e for dele	etion dis	splay.		
4.	Click th	ne <b>Se</b> l	ect checkbox bes	side the Trav	el Autho	orizatior	n that requi	res deletion.	
	Select	1							
5.	Click th	ne <b>De</b> l	ete Selected Aut	thorization(	s) butto	า.			
	Delete Selected Authorization(c)								
A <b>Confirmation</b> message displays indicating that the selected transaction has been deleted.									
	Favorites •     Main Menu •     >     Employee Self-Service •     >     Travel and Expenses •     >     Travel Authorizations •     >     Delete								
	Delete Confirmation								
	The selected transaction(s) have been deleted.								
	OK								



Step	Action
6.	Click the <b>OK</b> button.
	ОК
i	A deleted Travel Authorization cannot be viewed. The delete action is permanent and cannot be undone.



### Updating a Cash Advance

A Cash Advance can only be updated if it has been:

- Saved, but not been Submitted for approval
- Withdrawn from approval after submission
- Sent Back by an approver with required comments. An email is sent to the employee or the proxy who keyed the Cash Advance.

A Cash Advance cannot be updated if it has been:

- Approved
- Denied by the approver. An email is sent to the employee or the proxy who keyed the Cash Advance. A denied Cash Advance must be deleted.

Step	Action
1.	Navigate to the Cash Advance page using the following path:
	Main Menu > Employee Self-Service > Travel and Expenses > Cash Advances > Create/Modify

The Cash Advance Add a New Value page displays.

Favor	rites 🕶	Main Menu 🔻	> Employee S	elf-Service 🔻 🗄	> Travel and Ex	penses 🔻 🚿	Cash Advance	es 🕶 🔿	Create/Modify	1				
Cash	Advanc	e												
Ac	dd a Nev	v Value									Q Find a	n Existing Valu	e	
	*Empl ID [ Ad	d												
	For r "Ove in <b>Jc</b>	more infor erview of th <b>bb Aids</b> ur	mation pe ne Cardina nder <b>Lear</b>	rtaining al FIN S n <b>ing</b> .	to the Ca earch Pa	ardinal ages".	FIN Se This Jo	arch b Aic	pages, d is loca	refer ited or	to the J the Ca	lob Aid ardinal \	titled Nebsi	ite
2.	Click	the <b>Find</b>	an Existi	ng Valu	ie button									
	Q	Find an Exis	ting Value											



Step	Action
The <b>Ca</b>	ish Advance search page displays.
Fav	orites  Main Menu  Find Service  Travel and Expenses  Cash Advances  Create/Modify
Cas	h Advance
F	Find an Existing Value
	Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values.
	PRecent Searches Choose from recent searches V Saved Searches Choose from saved searches V
	Advance ID begins with  Advance Description begins with  Name begins with  Empl ID begins with
	Advance Status = v Creation Date = v Image: Image: Image
	Case Sensitive
	Search Clear
3.	On the Find an Existing Value page, enter the Advance ID.
	Advance ID begins with V
1	If the <b>Advance ID</b> is not known, search using the other options by clicking the <b>Search by</b> dropdown menu. The search options include "Advance Description", "Name", "Empl ID", "Advance Status", and "Creation Date".
	Users can only search for and update Cash Advances of employees for whom they are a proxy with "Edit & Submit" authorization. For more detailed information about authorizing a proxy, see the Job Aid titled <b>AP315: Authorizing a Proxy for an Employee</b> located on the Cardinal website in <b>Job Aids</b> under <b>Learning</b> .
4.	Click the <b>Search</b> button.
	Search



Step	Action	
The <b>Mc</b>	odify Cash Advance page displays.	
	Modify Cash Advance	
	*Business Purpose Training       ✓       Report 0000002424 Pending         *Advance Description Business Writing Course       Reference          Created 10/14/2024       Created 10/14/2024          Last Updated 10/14/2024           User Defaults	
	Cash Advance (2)       Import AI M Advances         View Printable Version       Votes         Matter All M Advances	
	*Source Description *Amount Currency Apply Tax	
	System Check V Registration Fee 375.00 USD	
	System Check Course Workbook 125.00 USD	
	Advance Amount 500.00 USD	
1	Inis page is identical to the page that was used to create the Cash Advance. Make any necessary changes to the Cash Advance. Users can perform any action on the Cash Advance that they could when creating it (e.g., add or delete lines, change amounts, etc). If modifying a Cash Advance that has been sent back by an approver, the user will see <b>Sent Back for Revision</b> in red font at the top of the page and a hyperlink with the approver's comment.	ce
5.	Click the <b>Save for Later</b> button if the transaction is not ready to be routed for approval.	
6.	Click the <b>Certification</b> checkbox option to enable the <b>Submit Cash Advance</b> button when ready to submit the cash advance. By checking this box, the employee has certified the advance requested is related to estimates of expenses to be incurred by the employee on official business of the Commonwealth of Virginia and include only such expenses necessary in the conduct of that business, and the advance will be repaid in accordance with policies/procedures outlined in CAPP Topic 20336.	
7.	Click the <b>Submit Cash Advance</b> button to send the updated Cash Advance through the approval workflow.	



Step	Action	
The <b>E</b>	xpense Report Submit Confirm page displays in a pop-up window.	
	Cash Advance Submit Confirm	
	Modify Cash Advance	
	Submit Confirmation	
	Totals	
	Advance Amount 500.00 USD	
(	OK Cancel	
8.	Click the <b>OK</b> button to submit the cash advance for review and approval.	
	OK Cancel	
j	Once the Cash Advance has been submitted, users can only modify the cash advance by clicking the <b>Withdraw Cash Advance</b> button when the cash advance is in a "Submitted for Approval" status or if it is sent back by the approver.	



### **Deleting a Cash Advance**

A Cash Advance request can be deleted if it has been:

- Saved, but not Submitted for approval
- Withdrawn from approval after submission
- Sent Back by the approver with a required comment. An email is sent to the employee or the proxy who keyed the Cash Advance.
- Denied by the approver. An email is sent to the employee or the proxy who keyed the Cash Advance.

Step	Action
1.	Navigate to the <b>Delete Cash Advance</b> page using the following path:
	Main Menu > Employee Self-Service > Travel and Expenses > Cash Advances > Delete

The Delete Cash Advance Search page displays.

Favor	rites  Main Menu  Finder Self-Service  Travel and Expenses  Cash Advances  Delete
Delet	te Cash Advance nd an Existing Value
E	Search Criteria Inter any information you have and click Search. Leave fields blank for a list of all values.
	Precent Searches Choose from recent searches V Raved Searches Choose from saved searches V
	Empl ID begins with   Name begins with
	Case Sensitive Search Clear
	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled "Overview of the Cardinal FIN Search Pages". This Job Aid is located on the Cardinal Website in <b>Job Aids</b> under <b>Learning</b> .
2.	The user's Employee ID defaults into the <b>Empl ID</b> field. Enter their Employee ID or Name if deleting a Cash Advance for another employee.
	Empl ID begins with 🗸
	Users can only search for and delete Cash Advances of employees for whom they are a proxy with "Edit & Submit" authorization. For more detailed information about authorizing a proxy, see the Job Aid titled <b>AP315: Authorizing a Proxy for an Employee</b> located on the Cardinal website in <b>Job Aids</b> under <b>Learning</b> .



Step	Action					
3.	Click the <b>Search</b> button.					
	Search					
The <b>De</b>	lete Cash Advance Report page displays.					
1	Favorites •     Main Menu •     > Employee Self-Service •     > Travel and Expenses •     > Cash Advances •     > Delete					
	Travel & Expenses - Cash Advance Report Delete Cash Advance Report					
	Cash Advance Information           Select         Advance ID         Description         Creation Date         Amount Currency					
1	Output         Business Writing Course         10/14/2024         500.00         USD					
1	Only cash advances that are eligible for deletion display.					
4.	Click the <b>Select</b> checkbox beside the cash advance that requires deletion.					
5.	Click the Delete Selected Advance(s) button.					
	Delete Selected Advance(s)					
A Conf	irmation message displays indicating that the selected transaction has been deleted.					
6.	Click the <b>OK</b> button.					
	OK					
i	A deleted Cash Advance cannot be viewed. The delete action is permanent and cannot be undone.					



### Updating an Expense Report

An Expense Report can be updated if it has been:

- Saved, but not submitted for approval
- Withdrawn from approval after submission
- Sent back by the approver with a required comment. An email is sent to the employee or the proxy who keyed the Expense Report

An Expense Report cannot be updated if it has been:

- Approved
- Denied by the approver. An email is sent to the employee or the proxy who keyed the Expense Report. A denied Expense Report must be deleted

Step	Action
1.	Navigate to the Expense Report page using the following path:
	Main Menu > Employee Self-Service > Travel and Expenses > Expense Reports > Create/Modify
The <b>Ex</b>	pense Report Add a New Value page displays.
Favo	Main Menu →     Employee Self-Service →     Travel and Expenses →     Expense Reports →     Create/Modify
Expe	ense Report
A	dd a New Value
	*Empl IDQ Add
1	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled "Overview of the Cardinal FIN Search Pages". This Job Aid is located on the Cardinal Website in <b>Job Aids</b> under <b>Learning</b> .
2.	Click the Find an Existing Value button.
	Q Find an Existing Value



Step	Action
The <b>Ex</b>	pense Report search page displays.
Favo	rites   Main Menu   → Employee Self-Service   → Travel and Expenses   → Expense Reports   → Create/Modify
Expe F	ind an Existing Value Search Criteria
E	Enter any information you have and click Search. Leave fields blank for a list of all values.
-	Recent Searches       Choose from recent searches       Image: Choose from saved searches       Image: Choose from saved searches
	Report ID begins with  Report Description begins with  Name begins with  Empl ID begins with  Creation Date =  Show fewer options
	Case Sensitive Search Clear
3.	Enter the <b>Report ID</b> of the Expense Report that needs to be modified on the <b>Find an Existing</b> Value tab.
i	If the ID is not known, search using the other options by clicking the <b>Search by</b> dropdown menu. The search options include "Report ID", "Report Description Name", "Empl ID", and "Creation Date".
	Report ID begins with •   Report Description begins with •   Name begins with •   Empl ID begins with •   Creation Date =
4.	Click the <b>Search</b> button.
i	Users can only search for and update Expense Reports of employees for whom they are a proxy with "Edit & Submit" authorization. For more detailed information about authorizing a proxy, see the Job Aid titled <b>AP315: Authorizing a Proxy for an Employee</b> located on the Cardinal website in <b>Job Aids</b> under <b>Learning</b> .



Step	Action
The <b>Mo</b>	dify Expense Report page displays.
Favorit	s ▼ Main Menu ▼ → Employee Self-Service ▼ → Travel and Expenses ▼ → Expense Reports ▼ → Create/Modify
Mod	y Expense Report
s	nt Back For Revision     By:     SUPERVISIOR APPROVER     Please update     Actions     Choose an Action     GO       *Business Purpose     Conference     V     Report 0000421632     Panting
	*Report Description Project Management Default Location Virginia Beach Q Reference Q A Attachments
Exp	nses @ dd All   Collapse All Add:   🌇 My Wallet (0)   🦸 Quick-Fill Total 378.56 USD
•	*Date     *Expense Type     *Description     *Payment Type     *Amount     *Currency       07/18/2024     ig     Lodging     *     *Indel stay     Image: Check     105.00     USD     Image: Check     105.00     USD     Image: Check     Image
►	07/18/2024 👸 Lodging Fees and Taxes 🖉 Check V 29.88 USD Q 🕑 🖃 240 characters remaining
►	07/18/2024 🙀 Per Diem Incidentis-Travel Day 🔹 Incidentals 3.75 USD Q 🕑 🖃 243 characters remaining
► 	07/19/2024 🙀 Per Diem Incidentis-Travel Day 🔹 Incidentals Check 🗸 3.75 USD Q 🖈 🖃 243 characters remaining
•	07/18/2024 👔 All Meals - Travel Day 💙 meals travel day 238 characters remaining Check 🗸 44.25 USD Q 🕑 🖃
•	07/18/2024 🕅 Dinner - Travel Day 💙 <sup>*</sup> dinner 248 characters remaining 248 characters remaining
►	07/18/2024     IP     Personi Mileage Cost Justified <ul> <li>fone way mileage</li> <li>239 characters remaining</li> </ul> <ul> <li>Check</li> <li>S5.09</li> <li>USD</li> <li>Image: Sign Check</li> <li>Image: Sign Check</li> <li>State Sign Check</li></ul>
1	This page is identical to the page that was used to create the Expense Report. Make the required updates to the Expense Report. Users can perform any action on the Expense Report that they could when creating it (e.g., add or delete lines, change amounts, dates, locations, etc). If modifying an Expense Report that has been sent back by an approver, the user will see <b>Sent Back for Revision</b> in red font at the top of the page and a hyperlink with the approver's comment. <b>Sent Back For Revision</b>
5.	Click the <b>Save for Later</b> button if the transaction is not ready to be routed for approval.
6.	When ready to submit the expense report after making revisions, click the <b>Summary and Submit</b> link at the top of the page.           Summary and Submit



Step	Action			
The <b>Modify Expense Report</b> page displays.				
	Favorites • Main Menu • > Employee Self-Service • > Travel and Expenses • > Expanse Reports • > Create/Modify			
	Modify Expense Report			
	Actions     Choose an Action     GO       *Business Purpose [Conference]     Report     0000421632     Pending       *Description [Project Management]     Created     10/10/2024       Reference     Q     Last Updated     10/15/2024			
	Totals (2)     Image: Constraint of the Version     Post State Not Applied       View Analytics     Image: Constraint of the Version     Image: Constraint of the Version			
	Employee Expenses (8 Lines)         378.56 USD         Non-Reimbursable Expenses         0.00 USD         Employee Credits         0.00 USD           Cash Advances Applied         0.00 USD         Prepaid Expenses         0.00 USD         Supplier Credits         0.00 USD			
	Amount Due to Employee 378.56 USD Amount Due to Supplier 0.00 USD			
	By Checking ins UX, the employee has certained use expenses naces and we employee on official business of the Commonwealth of Virginia and include only such expenses necessary in the conduct of that business.     Submit Expense Report			
7.	Click the Certification checkbox option to enable the Submit Expense Report button.			
	By checking this box, the employee has certified the expenses listed were incurred by the employee on official business of the Commonwealth of Virginia and include only such expenses necessary in the conduct of that business.			
8.	Click the <b>Submit Expense Report</b> button to send the Expense Report through approval workflow.			
The <b>Ex</b>	pense Report Submit Confirm page displays in a pop-up window.			
	Expense Report Submit Confirm			
	Expense Report			
	Employee Expenses (8 Lines) 378.56 USD Non-Reimbursable Expenses 0.00 USD Employee Credits 0.00 USD			
	Cash Advances Applied 0.00 USD Prepaid Expenses 0.00 USD Supplier Credits 0.00 USD			
	Amount Due to Employee 378.56 USD Amount Due to Supplier 0.00 USD			
	OK Cancel			
9.	Click the <b>OK</b> button to confirm that the updated Expense Report is submitted for approval.			
	OK Cancel			
1	Once the Expense Report has been submitted, users can only modify the Expense Report by clicking the <b>Withdraw Expense Report</b> button when the Expense Report is in a "Submitted for Approval" status or if it is sent back by the approver.			



### **Deleting an Expense Report**

Users can only delete an Expense Report if it has:

- Been saved, but not submitted for approval
- Withdrawn from Approval status
- Been sent back by the approver with a required comment. An email is sent to the employee or the proxy who keyed the Expense Report
- No Cash Advance applied to it
- Been Denied by the approver. An email is sent to the employee or the proxy who keyed the Expense Report. Denied Expense Reports should be deleted to restore any associated Travel Authorization if applicable. Users can then use the restored Travel Authorization to create another Expense Report if needed

Step	Action		
1.	Navigate to the <b>Delete Expense Report</b> page using the following path:		
	Main Menu > Employee Self-Service >Travel and Expenses > Expense Reports > Delete		
The <b>De</b>	The Delete Expense Report Search page displays.		
Far	vorites   Main Menu   → Employee Self-Service   → Travel and Expenses   → Expense Reports   → Delete		
Del	ete Expense Report		
	Find an Existing Value  Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values.		
	Precent Searches Choose from recent searches V R Saved Searches Choose from saved searches V R		
	Empl ID begins with  Q Name begins with  Show fewer options		
	Clear		
i	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled "Overview of the Cardinal FIN Search Pages". This Job Aid is located on the Cardinal Website in <b>Job Aids</b> under <b>Learning</b> .		
2.	The user's Employee ID will default into the <b>Empl ID</b> field. Enter the Employee ID or Name if deleting an Expense Report for another employee.		
	Empl ID begins with      Q       Name begins with		



Step	Action			
i	Users can only search for and delete Expense Reports of employees for whom they are a proxy.			
3.	Click the Search button.			
	Search			
The <b>Delete an Expense Report</b> page displays.				
	Favorites •     Main Menu •     >     Employee Self-Service •     >     Travel and Expenses •     >     Expense Reports •     >     Delete			
	Travel and Expense			
	Delete an Expense Report			
	Delete an Expense Report ②			
	Select Report ID Report Description Creation Date Amount Currency			
	O000421632         Project Management         10/10/2024         378.56         USD			
	O000421630         Project Management         07/22/2024         378.56         USD			
	O         0000421627         Meeting         07/19/2024         135.50         USD			
	Delete Selected Report(s)			
i	Only Expense Reports that are eligible for deletion display.			
4.	Click the <b>Select</b> checkbox option beside the Expense Report that requires deletion.			
	Select Report ID			
	0000421632			
5.	Click the <b>Delete Selected Report(s)</b> button.			
	Delete Selected Report(s)			



Step	Action	
A <b>Confirmation</b> message displays indicating that the selected transaction has been deleted.		
	Favorites  Main Menu  Employee Self-Service  Travel and Expenses  Expense Reports  Delete	
	Travel and Expense	
	Delete Confirmation	
	The selected transaction(s) have been deleted.	
	ОК	
6.	Click the <b>OK</b> button.	
	ок	
ĺ	A deleted Expense Report cannot be viewed. The delete action is permanent and cannot be undone.	